SP☉TLIGHT

Newsletter of the DOE E-Government Corporate R&D Portfolio Management Environment (ePME) project

Production Test Underway!

ePME is open for business! On February 1, the ePME system began receiving research and development proposals from the national laboratories for a production test scheduled to last through the end of April. A limited number of programs comprising a representative set of the Department's R&D portfolio are participating using actual R&D proposals. The ePME system will remain open for use after the test period ends.

As of February 1, ePME had already issued more than 100 IDs and passwords to licensed system users.

During the production test, laboratories are submitting R&D proposals for the FY 2005 execution year, the FY 2006 Initial Financial Plan, and the FY 2007 budget call, depending upon the business practices of the program. In some cases, programs are submitting proposals using the old paper process, as well as electronically through ePME.

The production test exercises the ePME application from end-to-end, from the submission of the proposal by the laboratory through the final approval or declination of the proposal by the program. Principal investigators, technical reviewers, budget analysts, program managers, and top officials will be involved in one or more aspects of the submission, review and approval process.

Following the production test, we will incorporate augmented features and functionality into the system. An updated system will be available for use by DOE headquarters, field/site/operations offices, and national laboratories in the late summer of 2005. The design of an enhanced version of the ePME system, which will accept *all* proposals from national laboratories, is scheduled to begin in FY 2006.

Production test participants include:

- All national laboratories and site/field/operations offices who have ePME Site Administration Managers
- Office of Science (all SC offices will participate with select program managers in those offices)
- Office of Fossil Energy (all FE offices will participate with select program managers in those offices)
- Office of Energy Efficiency and Renewable Energy (Solar Energy Technologies Program and Distributed Energy Program)
- Office of Nuclear Energy (Office of Advanced Nuclear Research, Advanced Fuel Cycle Initiative)

The National Nuclear Security Administration (Office of Nonproliferation Research and Engineering), though not a production test participant, is reviewing the system's functionality during the test period.

For a complete list of participating organizations, visit the ePME project Web site at http://epme.doe.gov.

New ePME Project and Technical Managers!

Vince Dattoria has been named the new ePME Project Manager and Greg Long of OSTI has been named the new ePME Technical Manager.

Vince Dattoria is the new ePME Project Manager. Prior to assuming this role, Mr. Dattoria was the Technical Manager, Module I Manager, and Security Manager for the ePME project. Mr. Dattoria initially came to DOE headquarters on assignment as the senior technical advisor to the Director of the Office of Scientific and Technical Information (OSTI). Before coming to DOE headquarters, he was the Associate Director for Information Systems Development at OSTI. Mr. Dattoria has held several project and engineering roles in the Department of Defense for various infrastructure and information systems since he began his career in 1986.

Greg Long is the new ePME Technical Manager. For the past ten years, Mr. Long has been involved in managing information technology projects and strategic planning for the Office of Scientific and Technical Information in Oak Ridge, Tenn. Before joining OSTI, Mr. Long managed the Software Engineering Branch for the Bureau of Alcohol, Tobacco and Firearms. He holds a MBA in Information Systems and is PMP (Project Management Professional) certified through the Project Management Institute.

Kimberly Rasar, the former ePME Project Manager, is now performing CIO duties for the Office of Science. We thank Ms. Rasar for the leadership, direction and tireless effort she gave to the project. We wish her well in her new endeavor.

From the New Project Manager

As the new ePME Project Manager, I would like to sincerely thank everyone who has participated in the project and helped us successfully reach milestone after milestone. Since I joined the project near its inception, I have appreciated working with dedicated project participants at the national laboratories, the site and field offices, and at headquarters. Through the requirements gathering phase, through system development and prototype testing, to the on-schedule and on-budget deployment of ePME to DOE's Application Hosting Environment last September, your cooperation and engagement have been instrumental to the project's success. As we begin the ePME production test, I look forward to continuing our productive collaboration. I would like to specially thank Kimberly Rasar, the previous project manager, for her diligence and hard work, which brought ePME to its successful deployment last September. To **all** project participants, past and present, *thanks again for your support!*

> —Vince Dattoria

Training Update

On January 12, we finished the final round of training for ePME Site Administration Managers (SAMs) involved in the production test. This training was a phased process. The first step was a kickoff Webinar, followed by an administrative training Webinar which lead SAMs through the ePME system setup process. The third step was hands-on classroom training on the ePME system, interaction with the Helpdesk, and learning administrative responsibilities.

SAMs are now assisting their end users in accessing training materials and helping users create user accounts. To facilitate end user training, an online curriculum of training tutorials is available on the ePME project Web site. Training modules cover the following functions related to R&D proposals:

- Creating
- Submitting
- Reviewing
- Approving/declining
- Searching
- Monitoring status (including subscribing for notification)

Deployment News – ePME "Goes Live!"

On September 30, 2004, the ePME system software was deployed to the Department of Energy's Application Hosting Environment on schedule and on budget. This first phase of the ePME system provides the capability for headquarter program offices to electronically receive and review research and development proposals from the national laboratories. Ultimately, up to 32 DOE sites should have access to ePME. Deployment to DOE sites focuses on:

- training of ePME Site Administration Managers (SAMs) to establish business process workflows in the ePME system
- establishing user accounts for the ePME system
- facilitating participant readiness to use the ePME system

ePME has established a Helpdesk to assist SAMs and to capture enhancement requests and new requirements.

What is a SAM?

SAM stands for Site Administration Manager. SAMs play an ePME leadership/liaison role in their organization in the implementation, training, and ongoing operation and support of the ePME system. SAMs are highly skilled, highly motivated, and highly appreciated. SAMs have a good understanding of their organization's R&D proposal processes and have a high level of credibility in their user community. Each major organization (i.e., national laboratory, site/field/operations office, and headquarter PSO) has at least one staff member serving as a SAM.

SAMs perform the following functions:

- Identifying end users and their roles in the R&D proposal process
- Determining how to implement the ePME system's standard workflow in their organization
- Collecting end user training certificates and obtaining/distributing user IDs
- Tracking and coordinating end user accounts
- Assisting their end user community in accessing and understanding the online training course
- Providing ongoing first line of Helpdesk support for their end user community

SAMs play a critical role in the success of the ePME system. **Thank you** to the following individuals who, by offering to serve as SAMs, are catalysts for change in their organization by advancing E-government.

- Jay Nathwani, EERE-Golden Field Office
- Qonnie Laughlin, EERE-HQ-Buildings
- Merrill Smith, EERE-HQ-Distributed Energy
- Rick Klimkos, EERE-HQ-Federal Energy Management Program
- Chuck Guyker, EERE-HQ-FreedomCar
- Crystal Blair, EERE-HQ-FreedomCar
- Thomas Lee, EERE-HQ-FreedomCar
- Ray LaSala, EERE-HQ-Geothermal
- Roxanne Danz, EERE-HQ-Hydrogen and Fuel Cells
- Charlie Sorrell, EERE-HQ-Industrial Technologies
- Harvey Wong, EERE-HQ-Industrial Technologies
- David Boron, EERE-HQ-Information and Business Mgmt Systems
- Kyra Humphreys, EERE-HQ-Planning, Budget and Analysis
- Cathy Short, EERE-HQ-Planning, Budget and Analysis
- Richard Budzich, EERE-HQ-Planning, Budget and Analysis
- Tommy Rueckert, EERE-HQ-Solar Energy Technologies
- Dan Ton, EERE-HQ-Solar Energy Technologies
- Joe Konrade, EERE-HQ-Weatherization & Intergovernmental Program
- Jack Cadogan, EERE-HQ-Wind and Hydropower Technologies
- Jim Armstrong, NREL
- Kevin Novotny, NREL
- John De Gregory, EM-HQ
- John Panek, FE-HQ
- Gerry McConnell, FE-HQ
- Karen Clark, FE-HQ
- Wolfe Huber, FE-NETL
- Pierina Noceti, FE-NETL
- Sue Lesica, NE-HQ

- Jihad Aljayoushi, NE- Idaho Ops Office
- John Uecke, NNSA-HQ
- Ivy Martin, NNSA-HQ
- Terry Bearce, NNSA-HQ
- Karen Nakamura, NNSA-HQ
- Carolyn F. Chezik, LLNL
- Raul Archuleta, LANL
- Laura Liles, LANL
- Larry Roybal, LANL
- Chris Trujillo, LANL
- Jerry Massee, Los Alamos SO
- Patrick Moss, Los Alamos SO
- Vicki Bender, LLNL
- Lauren Reed, LLNL
- Bob Hilliard, Livermore SO
- Jim Marcisz, Livermore SO
- Rick Balthaser, Sandia SO
- Jesse Hewitt, Sandia SSO
- Carol Ferguson, SNL
- Denise LaPorte, SNL
- Devon Powers, SNL (Livermore)
- Thomas Kiess, RW-HQ
- Choon Quan, RW-HQ
- Ila Haugen, AMES
- Lora Larrance, AMES
- Roxanne Purucker, Ames SO
- Richard Blogg, ANL
- Betty (Beiwen) Dai, ANL
- Mary Beth Mehi, ANL
- John Kasprowicz, Argonne SO
- Sergio Martinez, Argonne SO
- Srinivasan Iyer (Srini), BNL
- Nick Torres, Brookhaven SO
- Gary Peabody, Chicago Ops Office
- Bruce Chrisman, FNAL
- Connee Trimby, FNAL
- Denise Keiner, FNAL
- Dennis Wilson, Fermi SO
- Melea Baker, SC-HQ-Advanced Scientific Computing Research
- Jane Hiegel, SC-HQ-Advanced Scientific Computing Research
- Yukiko Sekine, SC-HQ-Advanced Scientific Computing Research

- William (Bill) Millman, SC-HQ-Basic Energy Sciences
- Christie Ashton, SC-HQ-Basic Energy Sciences
- Sharon Betson, SC-HQ-Biological and Environmental Research
- Roland Hirsch, SC-HQ-Biological and Environmental Research
- Karen Summers, SC-HQ-Budget
- Steve Eckstrand, SC-HQ-Fusion Energy Sciences
- John Sauter, SC-HQ-Fusion Energy Sciences
- Donna Lang, SC-HQ-High Energy Physics
- Katie Perine, SC-HQ-High Energy Physics
- Cathy Hanlin, SC-HQ-Nuclear Physics
- Brenda May, SC-HQ-Nuclear Physics
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- Sharon Parkinson, JLAB
- Sherri Powers-Moore, JLAB
- Andre' Bethea, JLAB SO
- Anastasia See Schiller, LBNL
- Bridget Haverty, LBNL
- Doug Low, Berkeley SO
- Carol Ingram, Berkeley SO
- Mary Rawlins, ORNL SO
- Wayne Lin, ORNL SO
- David Bond, ORNL
- DeAnn Ingram, ORNL
- Bryan Kendrick, ORNL
- Preston Maples, Oak Ridge Ops Office
- Janie Treadway, PNNL
- Lance Vickerman, Pacific Northwest SO
- Kim Williams, Pacific Northwest SO
- Marie Iseicz, PPPL
- Jackie (Jaclyn) Pursell, PPPL
- Sarah Lawson, Princeton SO
- Ray Kimble, Prinston SO
- Linda Stegena, Prinston SO
- Bob Strohecker, SLAC
- Dominic Passanisi, SLAC SO
- Tyndal Lindler, Stanford SO

EERE = Office of Energy Efficiency and Renewable Energy, EM = Office of Environmental Management, FE = Office of Fossil Energy, NE = Office of Nuclear Energy, NNSA = National Nuclear Security Administration, RW = Office of Civilian Radioactive Waste Management, SC = Office of Science, NREL = National Renewable Energy Laboratory, LLNL = Lawrence Livermore National Laboratory, LANL = Los Alamos National Laboratory, SNL = Sandia National Laboratory, AMES = Ames Laboratory, ANL = Argonne National Laboratory, BNL = Brookhaven National Laboratory, FNAL = Fermi National Accelerator Laboratory, INEEL = Idaho National Engineering and Environmental Laboratory, JLAB = Thomas Jefferson National Accelerator Facility, LBNL = Lawrence Berkeley National Laboratory, NETL = National Energy Technology Laboratory, ORNL = Oak Ridge National Laboratory, PNNL = Pacific Northwest National Laboratory, PPPL = Princeton Plasma Physics Laboratory, SLAC = Stanford Linear Accelerator Center, SO = Site Office

List current as of 1-26-05

ePME Sharpens its Focus

In July 2004, the ePME project underwent an external review by the MITRE Corporation at the direction of the Associate Deputy Secretary of Energy. The review found that significant organizational value has been created through the ePME project, which has been ongoing through several related initiatives: (1) E-government; (2) DOE Order 413.3; (3) I-MANAGE; and (4) Enterprise Architecture. The review also found that:

- R&D management functions are distinct from, but interrelate with, financial management functions
- Several DOE performance management systems are related to R&D management
- Several emerging DOE enterprise solution initiatives may be related to R&D management
- An opportunity exists for an architected commercial-off-the-shelf solution set that could be implemented in increments to achieve improved R&D management, a mission critical activity for DOE

On August 19, 2004, the Chief Information Officer and the Deputy Director of the Office of Science approved an ePME project path forward that responds to the MITRE review recommendations and moves the Department to an architected commercial-off-the-shelf solution to support improved R&D management.

The focus of the ePME project is on the successful completion of ePME's first phase, Electronic Receipt and Review of new and ongoing R&D national laboratory proposals. DOE management will determine, using COTS-based Enterprise Architecture, how best to implement tools to support planning, analysis, evaluation and management of R&D programs and projects.

eIDK Beta Test a Success

Another successful milestone occurred July 13-19, 2004, when Argonne National Laboratory staff verified the

ability of the Electronic Interface Developer's Kit (eIDK) to upload proposals during an eIDK beta test. The eIDK enables national laboratories to save substantial amounts of time by creating proposals using their existing systems, then submitting the proposals in batch mode to the ePME system. The eIDK uses standardized XML-based Web services accessible through the ePME system. The project development team received and vetted Agronne's beta test feedback, and was able to incorporate some of the testers' recommendations into the eIDK's final build. We are considering other feedback through the Change Control Process.

Feedback Wanted!

- We want to hear from you. Help promote ePME by telling others about the project or pointing them to the project Web site: http://epme.doe.gov.
- Suggest or submit an article for future editions of *Spotlight*.
- Tell us what you think about ePME. We need your input to successfully develop and implement this first-of-a-kind system.

    Contact Jim Fremont, ePME Communication and Outreach Manager, at james.fremont@ee.doe.gov